
Integration Partner Program Leadership and Administration Achievement Report (Deliverable 125.1.1b) February 2003

Executive Summary

The Integration Partner Integration Leadership provides FSA leadership, the project managers, business architects, and technical architects on the Integration Partner program with the key leadership oversight, enterprise focus, and strategic direction to fulfill the goals of FSA's integration program. At the present time, the FSA Integration program is in a checkpoint phase as it works to shape and align initiatives with current strategic goals that will lead to a suite of fully integrated student services that are primarily electronic, self-service and real-time.

Integration Leadership Support & Direction Setting

Summary

Integration Partner supports FSA Leadership's establishment of actions required to drive the development of integration projects and initiatives. Discussions and negotiations have been held to determine the future roles of the Integration Partner as it relates to leadership and integration activities.

Integration Progress

The following are synopses outlining major initiative within the Integration Partner program including the following: Common Origination and Disbursement (COD), Common Services for Borrowers (CSB), Integrated Data Strategy, NSLDS II, Case Management and Oversight (CMO), Integrated Aid Processing (IAP) and CRM4FSA.,

- **COD**
 - ✓ The COD solution continues to move forward towards release 2.0. The current release provides FSA with a core, single integrated solution to manage aid originations and disbursements.
- **CSB**
 - ✓ Common Services for Borrowers – the existing task order is set to expire in late February. Discussions are underway with FSA to either extend the existing task, initiate a new task order, award an ATP, or let the task expire. This effort coincides with FSA's development of an RFP and SOO for the DLSS contract re-competition.
- **Integrated Data Strategy**
 - ✓ A Data Strategy task order is under development. Current plans include the development of business objectives and as-is data flows depicting the inputs and outputs of key FSA data and data storage systems.
 - ✓ FSA needs to define the long-term direction for NSLDS reengineering. Without this direction, the overall Data Strategy cannot be finalized, specifically the Quality Assurance Plan and data cleanup efforts.
 - ✓ Discussions are underway to finalize the scope of FY03 activities. FSA needs to come to a conclusion on scope by mid- to end of March or performance plan goals will not be

- achieved. Technology strategies are under development, which will look to develop overall business objectives for web portals, web services, data marts, internal data exchanges, and an FSA Gateway.
- ✓ The XML Framework is under development. The Integration Partner will continue to formalize the XML Strategy and Approach.
 - ✓ The Integration Partner continues to develop conceptual designs and approach documents for the Common Student Identifier and the Routing ID (School Identifier). Additionally, the Integration Partner is working with FSA to get this task on contract to enable a full-fledged effort to go forward.
 - **Case Management & Oversight (CMO)**
 - ✓ A task order is under development for the Case Management task. Efforts are currently underway to review and document current business processes, compile the as-is high-level PEPS requirements and complete the high-level target state definition and sequencing plan.
 - **Integrated Aid Processing (IAP)**
 - ✓ Complete CPS support which provided a CPS upgrade analysis, ED PIN Performance Test Plan and Performance Test.
 - ✓ Initial analysis started for ED PIN Reengineering, which will verify that the ED PIN is scalable as a standards-based enterprise identification service for students, parents and borrowers.
 - **CRM4FSA**
 - ✓ The CRM4FSA invoice will be submitted to FSA on March 3, 2003.

Program Leadership & Integration Issues

- Integration Partner Contracts & Proposals
 - ✓ The Integration Partner has been notified that the Department of Education has instituted an additional step in the overall proposal process. The new process has lengthened the average time for task orders to be awarded. Several ATPs have been provided in the interim to provide continuity until a task order can be awarded.
- Integration Partner Access to the FSA Extranet
 - ✓ As you may know, FSA has discontinued access to FSA's intranet for contractors. This raises a few concerns for Integration Partner teams who require access to FSA standards in order to adhere to those standards for development efforts. This also raises the issue of version control and contract management commitment issues if projects inadvertently use or adhere to an outdated version. The extranet was established because many contractors did not have access to the EDLAN and this was a way to enable access to key FSA policies, procedures and standards.

Participation in FSA Business Integration Group

The Integration Partner provides support to the FSA Business Integration Group (BIG). Accomplishments included assistance with the development of a Group charter, outlining existing dependencies among FSA's various integration projects and initiatives, creation of a series of Integrated Timelines and Dependency Views, and management of the agenda for future BIG meetings.



Some key integration discussions included:

- ✓ Single Sign On
- ✓ Enrollment & Access Management
- ✓ CIO Baseline Operations
- ✓ Enterprise Ancillary Services
- ✓ Minimum HW/SW Requirements

FSA Integration Vision

The Integration Partner completed the draft of the Integration Vision in coordination with the FSA Deputy CIO. A final draft will be submitted with this Task Order. Integration Partner has recommended that the FSA Business Integration Group and the Management Council review the draft Integration Vision.

Integration Partner Project Dependency Tracking & Sequencing

In order to align the Integration Partner program with the business needs and strategic objectives of FSA, dependencies, impacts and sequencing plans for key integration initiatives must be identified. The Integration Partner continues to identify and track project dependencies. The dependencies, impacts and sequencing are maintained through multiple documents. The Dependency Tracking Log is under development with the FSA BIG and will be available in future reports.



Progress Towards FSA Strategic Objectives

The following table lists key Integration Partner activities and accomplishments (“Contributing”) towards FSA’s strategic objectives, as well as, delays or cancellations (“Detracting/Delayed”) that detract from FSA’s Strategic Objectives. Each are followed by an analytical assessment of the impact of those efforts towards FSA’s objectives.

Strategic Objectives	Contributing	Detracting/Delayed
FSA Systems Integration and Technology Solution Initiatives	<p>COD</p> <ul style="list-style-type: none">Single origination and disbursement solution implemented in 2002.Release 2.x will enable retirement of existing legacy systems (RFMS and DLOS). <p>FMS</p> <ul style="list-style-type: none">Core financial controls solution interfaces with major FSA operating systems.FMS provides major systems integration with over 8 FSA and DoED systems. <p>EAI Middleware</p> <ul style="list-style-type: none">Middleware architecture enables legacy and modernized solutions to interact in an integrated and common language fashion.	<p>Common Services for Borrowers</p> <ul style="list-style-type: none">Delay in development will impact ability to integrate existing three legacy systems, DLSS, DLCS and DMCS.
Improve Program Integrity	<p>FMS</p> <ul style="list-style-type: none">Core financial controls solution enables FSA achievement of clean audit <p>LaP/LARS</p> <ul style="list-style-type: none">Implementation provides financial partners with ability to conduct transactions with FSA electronically	N/A
Reduce Cost	<p>eZAudit</p> <ul style="list-style-type: none">Development program on path to enable reduction in cost of managing audits of school financial statements	<p>eZAudit</p> <ul style="list-style-type: none">Solution awaiting PRA approval from OMB (in process). This delay will impact FSA’s realization of full



Reduce Cost (continued)	<p>COD</p> <ul style="list-style-type: none">○ COD solution will begin to generate savings to FSA ahead of schedule in GFY2003	<p>cost savings as planned.</p> <p>CSB</p> <ul style="list-style-type: none">○ Uncertainty in the development of the CSB solution will impact the ability to reduce the costs of the existing legacy systems (DLSS, DLCS, and DMCS). <p>eServicing</p> <ul style="list-style-type: none">○ Delays in promoting the eServicing solution have impacted the ability to increase the savings stream. <p>NSLDS</p> <ul style="list-style-type: none">○ The decision to delay the development and implementation of the NSLDS II solution will impact FSA's ability to reduce its overall cost structure
Improve Human Capital Management	N/A	N/A
Improve Products and Services	<p>FAFSA (Jan 2003 Release)</p> <ul style="list-style-type: none">○ The recent release of FAFSA was performance tested by the Integration Partner. During simulated system peaks issues were identified and resolved. In addition, risk mitigation strategies and contingency plans were developed.	<p>CRM4FSA</p> <ul style="list-style-type: none">○ The decision to stop all work on the CRM4FSA solution will delay FSA's ability to deliver planned improved products and services to its customers.



Integration Efforts Planned for March 2003

The Integration Partner will focus on further developing the following integration areas: Common Origination and Disbursement (COD), Common Services for Borrowers (CSB), CRM4FSA, Integrated Technology and Data Strategy, NSLDS II, Case Management and Oversight (CMO) and Integrated Aid Processing (IAP). The Integration Partner Integration and Leadership team will continue to work with these efforts in Task Order 126 going forward to drive FSA's integration program towards the accomplishment of its overall goals.



Integration Program Level Risks & Issues

The following represent program level risks and issues that have been identified by the Integration Partner program. A superset of these risks and issues are reported by each project team on a bi-weekly basis, discussed within the Integration Partner and a specific sub-set are identified for escalation to FSA leadership within this monthly report.

#	Owner	Risk Description	Impacts	Dependent Parties	Risk Category	Open Date	Status	Mitigation Response	Severity	Probability	Level Of Control
5	eAudit	Ability to secure required regulatory changes.	Impact to operations costs, May delay outreach (Federal Register notice)	FSA-Jeff Baker and Randy Wolff	Operational & Financial	1-Feb	In-Progress	Revisit of issue by OGC and IG; Federal Register posting also needs update to include proprietary schools. School mandatory use of eAudit unlikely.	Critical	Very Likely	Moderate
3	COD	FSA may not have enough resources to review all deliverables by their due dates.	Impacts design, coding, test planning and test execution.	TSYS Development Staff	Operational	18-Nov	In-Progress	Meetings will be held to prioritize items to be reviewed by FSA.	High	Likely	Moderate
10	COD	Concurrent Development Effort – significant overlap between 1.x, 2.0, 2.1, 2.2 releases	Impacts schools, customer service and FSA users of COD	Trading Partner, /customer Service, FSA staff	Operational	1-Oct	In-Progress	Additional resources are being added to the team. Resource planning is being done	High	Likely	Moderate
7	EAI	Effort to support CSC's implementation of the staging environment may drain significant EAI team resources.	EAI resources are not available to support other EAI applications or implementations, impacting schedules.	Applications that depend on EAI support.	Operational	31-Jan	In-Progress	Working with CSC and FSA to help define the staging approach and implementation plan.	Medium	Likely	Moderate
9	eAudit	FSA adoption of new business processes to fully exploit the electronic submission advantages of eAudit.	Modifications to existing business procedures required to incorporate eAudit mods to process. These would be ideal for training.	FSA-Randy Wolff and Ti Baker	Operational	1-Oct	In-Progress	Revised business procedures to be completed by FSA eAudit staff. Staffing to complete task identified and assigned. Delivery to PIP for final	Medium	Likely	Total



								authorization. PIP schedules for revision (late March) very close to application deployment to Case Teams.			
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Issue Action Log

#	Owner	Issue Description	Impacts	Dependent Parties	Issue Category	Open Date	Target Resolution Date	Status	Priority	Proposed/Actual Resolution
7	COD	Requirements/design sign-off slips due to resource allocation to production problems.	2.0 and 2.1 Development	2.0 and 2.1 Development	Operational	15-Dec		In-Progress	2-High	Prioritize resources to review most critical deliverables.
4	Portal Rollout	The System of Record packet has not been submitted to OMB by ED/CIO due to delays between ED/CIO and ED/OGC.	There is a day-for-day schedule delay of the implementation of Release 2 of the Students Portal.	Students, Students Channel, ED/CIO, ED/OGC, OMB	Operational	1-Oct	28-Feb	In-Progress	2-High	Continued meetings with ED/OGC and OMB to address potential issues and speed up the process
3 9	Security and Privacy Support	Client Lead leaving FSA for a new opportunity in another Department. No successor has been named.		BearingPoint contractor	Operational	21-Feb	Open	New	4-Low	Proposed solution: Work with remaining FSA staff to ensure project continues successfully and all deliverable are met on time